



**VAST POINT OF SALE HOW TO:  
*FORCE A SPECIFIC PAYMENT TYPE***

**TABLE OF CONTENTS**

**INTRODUCTION..... 3**

**BUILDING A NEW PAYMENT TYPE ..... 3**

**BUILDING A NEW CUSTOMER TYPE ..... 5**

**BUILDING A NEW CUSTOMER ..... 6**

**ASSIGNING AN EXISTING CUSTOMER TO A NEW CUSTOMER TYPE ..... 8**

*CHANGING THE CUSTOMER TYPE IN VAST MAINTENANCE .....8*

*CHANGING THE CUSTOMER TYPE IN THE POINT OF SALE: MAINTENANCE SETUP..... 10*

*CHANGING THE CUSTOMER TYPE IN THE POINT OF SALE..... 11*

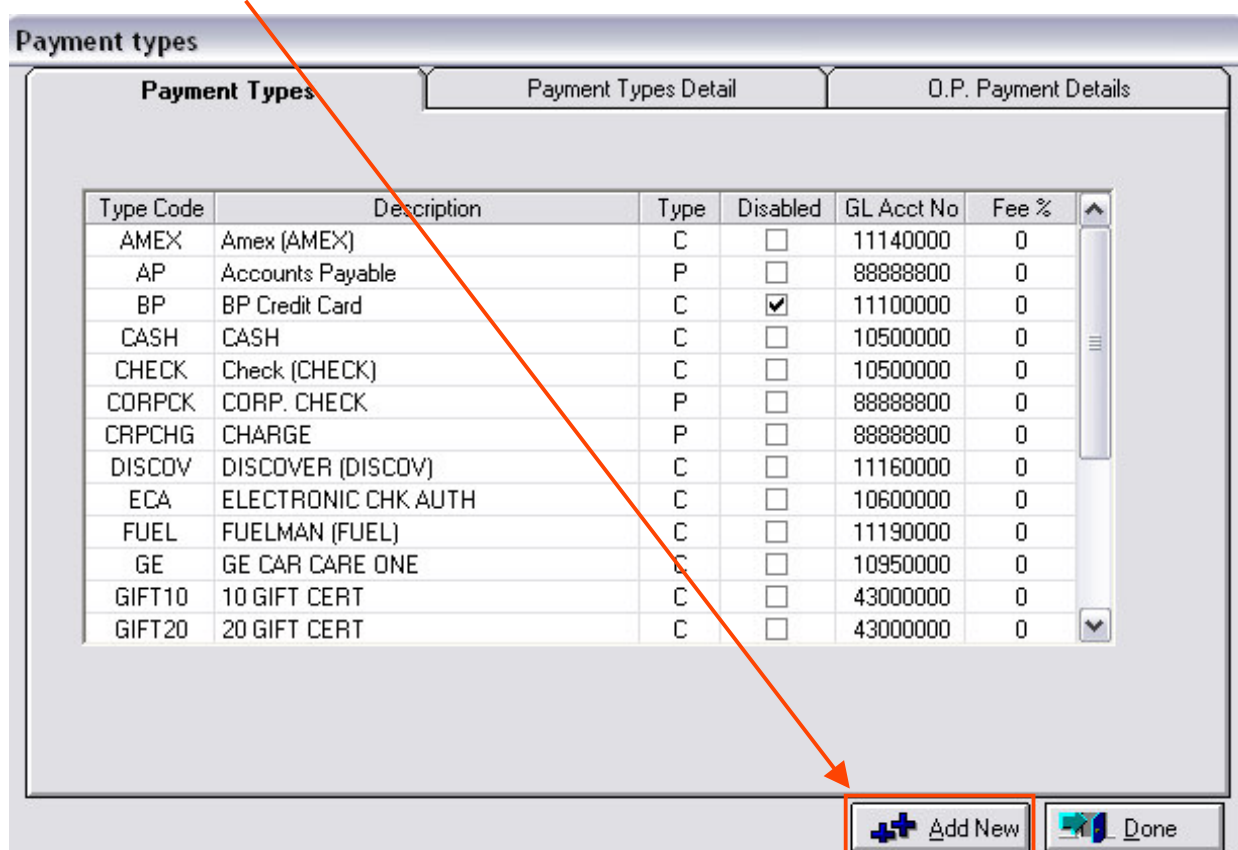
**If you have any questions or need assistance with these instructions, please contact:  
Vast Support at 1-800-535-4242.**

## INTRODUCTION

This document will provide you with instructions on how to force a specific payment type to be used anytime you create an invoice for certain customers, based on their customer type. In order to do this, the document will walk you through the steps necessary to build a new payment type, build a new customer type and then build a new customer and assign it to the customer type. You do have the option of using an existing payment type, customer type and customer if you would like. Therefore, the last section of the document shows you how to assign a customer type to an existing customer. These instructions are for both Single Shop and Vast Multi-Store users.

## BUILDING A NEW PAYMENT TYPE

1. Open Vast **MAINTENANCE**.
2. Then click on the **PAYMENT TYPES** icon. You will see a screen similar to the one shown below.
3. Click the **ADD NEW** button.



4. You will be taken to the **PAYMENT TYPES DETAIL** tab. Enter the **PAYMENT TYPE CODE**, **PAYMENT TYPE DESCRIPTION** and **PAYMENT TYPE PROCESSOR CODE** (if applicable) for the new payment type into the fields shown. You will need to make sure that this information is different than any of the other existing payment types. You will also want to make sure that the description is meaningful and specific, since this is what will be displayed on the payment screen in the point of sale.

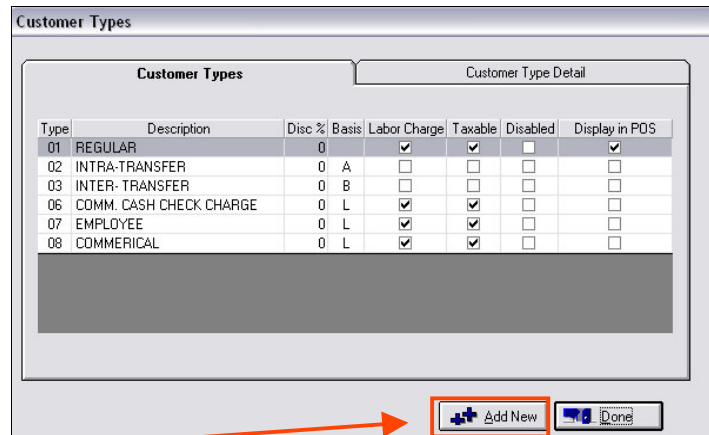
Payment types		
Payment Types	Payment Types Detail	O.P. Payment Details
Payment type code	NATL	Credit card <input type="checkbox"/>
Payment type description	NATIONAL	Requires validation <input type="checkbox"/>
Account type	Cash	Disabled <input type="checkbox"/>
Payment type processor code	NATL	Process fee <input type="text"/> %
Payment type merchant number		Country USA
		Gift Certificate <input type="checkbox"/>
Usage		
Bank deposit		
Return type		
POS payment	<input checked="" type="checkbox"/>	
Intra shop transfer		
Inhibit overtendering		
ROA Payment		
CFA Customers		
National Accounts		
Intra Company sales		
Payroll Deduction		
Purchasing		
Allow refund		
Use for refund		
Populate Actual Amount	<input checked="" type="checkbox"/>	
Use for CoreReturn		
<input type="button" value="X Cancel"/> <input type="button" value="✓ Save"/>		

5. Then click on the **ACCOUNT TYPE** dropdown and select the appropriate type. If this new payment type is cash or a credit card, you will want to select **CASH** as the account type. If this is a new accounts receivable payment type, select **HOUSE ACCOUNT** as the account type.
6. Then put a checkmark in the applicable items under the “USAGE” section. A brief explanation of some of the more common items is given below:
- **BANK DEPOSIT** – the proceeds of this payment type should be included in your nightly bank deposit.
  - **RETURN TYPE** – allow this payment type to be used for deposit returns
  - **POS PAYMENT** – show this payment type in the dropdown list at the time of invoice
  - **INHIBIT OVERTENDERING** – do not allow the amount of the payment to exceed the amount due on the invoice
  - **ROA PAYMENT** – allow this payment type to be used for receipt on account payments
  - **CFA CUSTOMERS** – allow this payment type to be used for Corporate Fleet Account invoices
  - **NATIONAL ACCOUNTS** - allow this payment type to be used for National Account invoices
  - **POPULATE ACTUAL AMOUNT** – Vast will populate the “actual amount” column automatically for you on the Daily Cash-Up screen.
7. If the payment type is a credit card, put a checkmark in the **CREDIT CARD** checkbox in the top right corner of the screen.
8. Then click **SAVE** and **DONE** to save your new payment type and return to the Vast Maintenance main menu.

## BUILDING A NEW CUSTOMER TYPE

Next, you can create a new customer type, which you can then assign specific customers to. You can also assign a payment type to be forced for this customer type. This way, any customers that are assigned to this customer type will only be allowed to pay for an invoice using the payment type you have selected.

1. From the **VAST MAINTENANCE** main menu, go to **CUSTOMER TYPES**. You will see a screen similar to the one shown below.



2. Click **ADD NEW**. You will be taken to the **CUSTOMER TYPES DETAIL** tab.
3. Enter a number in the **CUSTOMER TYPE #** field, and a name for this customer type in the **DESCRIPTION** field. You will need to make sure that the number and description are different than any of the existing customer types.
4. If you are building a fleet customer type, click on the **FLEET TYPE** dropdown and select either **"SHOP"** or **"CORPORATE"**.
5. Click on the **PAYMENT TYPE** dropdown and select the new payment type that you created.
6. Then click on the **"FORCED"** radio button. Your screen should now look similar to the one shown below. Click **SAVE**.
7. Then click **DONE** to exit the screen.

**\*VAST MULTI-STORE USERS:** Put a checkmark in the **"CREATE TEXT FILE"** checkbox.

Customer Type #: 10  
 Description: NATIONAL  
 Percent:   Increase  Discount  
 Sell Price Basis:   
 Fleet Type: (none)  
 Default A/R Term: (none)  
 Payment Type: NATIONAL  Forced  Default  Disallow  
 Labor Charge  Taxable  Other Tax: ... Disabled  Display in POS   
 Cancel Save  
 Add New Done

## BUILDING A NEW CUSTOMER

Now that we have assigned our newly created payment type to be forced for our new customer type, we will need to complete the setup by either building new customers under this customer type, or assigning existing customers to this new customer type. This section of the document will take you through the steps necessary to build a new customer and assign the customer type. If you are going to be assigning existing customers to the new customer type, please skip to the next section in the document.

1. From the Vast Maintenance main menu, click on **CUSTOMERS**. You will see a screen similar to the one shown below.

2. Click on **ADD NEW**. You will see the following screen appear, which asks if you are adding a **FLEET ACCOUNT**. If this is a **FLEET** customer, click **YES**, otherwise click **NO**.

3. You will be taken to the **CUSTOMER INFO** tab. Depending on your answer in step 2, you will see different fields for either individual customer or business information. **ENTER** in the **CUSTOMER'S COMPLETE INFORMATION**, including name, address, phone number and gender but **DO NOT ENTER A CUSTOMER NUMBER.**

- Then click on the **TYPE** dropdown and select the new customer type you created in the previous section. When you are finished, your screen should look similar to the one shown below.

The screenshot shows a software window titled "Customers" with several tabs: "Customers", "Customer Info", "Account Info", "Add'l Fleet Info", "Ship-To Cust.", and "Messages". The "Customer Info" tab is active. The form contains the following fields and controls:

- Customer #: [Empty text box]
- First name: JOHN
- Last name: SMITH
- Address: 10 MAIN ST
- City: ALLENTOWN
- State: PA
- Zip/Postal Code: 18104
- Gender: MALE
- Buying Level: [Empty dropdown]
- Information: [Empty text box]
- Email Address: [Empty text box]
- Country: USA
- Retread Customer:
- Disallow Tagalongs:
- Labor Rate: [Empty text box]
- Phone numbers: Work, Home, Other (each with area, number, and extension boxes)
- Type: 10 NATIONAL (highlighted with a red box)

At the bottom of the window, there are four buttons: "Add New" (with a plus icon), "Cancel" (with a red X icon), "Save" (with a green checkmark icon), and "Done" (with a blue icon).

- Then click **SAVE** and **DONE** to save your changes and exit the screen. In the future when you create an invoice for this customer in the Point of Sale, the payment type you selected for this customer type will be forced at the time of invoice.

## ASSIGNING AN EXISTING CUSTOMER TO A NEW CUSTOMER TYPE

This section of the document will show you the steps necessary to assign your existing customers to the new customer type, so that when you create an invoice, it will force this customer to use the payment type you selected. You have the option of changing the customer type in Maintenance, or on the Customer Contact screen in the Point of Sale. If you would like to allow the technicians to change the customer type in the Point of Sale, there are some additional setup steps required. It is important to note that anytime the technician changes a customer type in the point of sale, the change is permanently saved to the customer's record. All subsequent estimates for that customer are affected, not just the one the technician is currently working on.

## CHANGING THE CUSTOMER TYPE IN VAST MAINTENANCE

1. From the Vast Maintenance main menu, click on **CUSTOMERS**. You will see a screen similar to the one shown below.

The screenshot shows the 'Customers' window with the following details:

- Company:** 2603
- Customer Type:** All
- Name:** (empty field with ellipsis button)
- Table Headers:** Cust Number, First Name, Last Name, Address, City, Type
- Table Content:** Empty
- Checkbox:** Show inactive customers (Account Status Z)
- Buttons:** Add New, Cancel, Save, Done

2. Search for the customer by using the **NAME** field and clicking on the **ELLIPSIS BUTTON**.
3. Then highlight the customer's name in the list that appears and click the **CUSTOMER INFO** tab. You will see a screen similar to the one shown on the following page.

The screenshot shows a software window titled "Customers" with a tabbed interface. The "Customer Info" tab is active. The form contains the following fields and controls:

- Customer #: [Empty text box]
- First name: JOHN
- Last name: SMITH
- Address: 10 MAIN ST
- City: ALLENTOWN
- State: PA
- Zip/Postal Code: 18104
- Gender: MALE
- Buying Level: [Empty dropdown]
- Country: USA
- Phone numbers: Work, Home, Other (each with three digit boxes and an Ext. box)
- Retread Customer:
- Disallow Tagalongs:
- Labor Rate: [Empty text box]
- Type: 10 NATIONAL (highlighted with a red box)

At the bottom of the window, there are four buttons: "Add New" (with a plus icon), "Cancel" (with a red X icon), "Save" (with a green checkmark icon), and "Done" (with a blue and green icon).

4. Click in the **TYPE** dropdown and select the new customer type from the list.
5. Then click **SAVE**.  
**\*VAST MULTI-STORE USERS:** Put a checkmark in the “**SEND TO SHOP**” checkbox.
6. Then click **DONE** to exit the screen. In the future when you create an invoice for this customer in the Point of Sale, the payment type you selected for this customer type will be forced at the time of invoice.

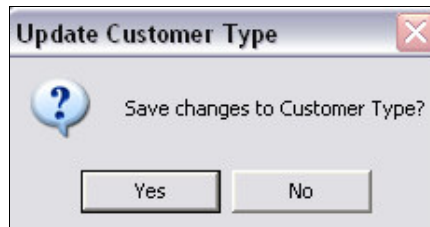
## CHANGING THE CUSTOMER TYPE IN THE POINT OF SALE: MAINTENANCE SETUP

Before you will be able to use this feature, you will need to complete the initial setup in Vast Maintenance. Please follow the steps listed below to do this:

1. Open **VAST MAINTENANCE** and go to the **CUSTOMER TYPES** icon.
2. You will see a list of existing customer types appear. Select one of the customer types that you would like to have the ability to change within the **POINT OF SALE**.
3. Then go to the **CUSTOMER TYPE DETAIL** tab.
4. Put a checkmark in the “**DISPLAY IN POS**” checkbox, as shown below.

The screenshot shows the 'Customer Type Detail' window. The 'Display in POS' checkbox is checked and highlighted with a red box. Other fields include Customer Type #: 10, Description: NATIONAL, Percent: 0, Sell Price Basis: LIST, Payment Type: ELECT, and Labor Charge, Taxable, and Other Tax checkboxes are unchecked. The Disabled checkbox is also unchecked.

5. You can then click **SAVE** to save your changes. A messagebox will appear asking you to confirm the save, as shown below. Click **YES**.



6. You can then go back to the **CUSTOMER TYPES** tab and select another customer type to change. You will need to repeat these steps and put a checkmark in the “**DISPLAY IN POS**” tab for **EVERY CUSTOMER TYPE** you would like to see in the **POINT OF SALE** screen.

**\*VAST MULTI-STORE USERS:** When you are finished making changes, be sure to put a checkmark in the “**SEND TO SHOP**” checkbox before exiting the screen.

## CHANGING THE CUSTOMER TYPE IN THE POINT OF SALE

1. Open **VAST POINT OF SALE** and click on **CUSTOMER CONTACT** to create a new estimate.
2. You can then either **SEARCH FOR** and **SELECT** an **EXISTING CUSTOMER**, or **CREATE A NEW CUSTOMER**.
3. On the **CUSTOMER CONTACT** screen, next to the customer's name, you will see a **TYPE** button, as shown below.

Customer/Auto SMITH 1999 DODGE

**Customer** **Auto**

New Estimate 01 REGULAR CUST

Last Name: SMITH First Name: JOHN **Type**

Year: 1999 Make: DODGE

Model: NEON

Engine: L4-1996cc 2.0L F/I Mileage In: 0000

City: ALLENTOWN State: PA Zip/Postal Code: 18104

Home Phone: 610 336 9045 Use:  Other Phone: Ext: Use:

Work Phone: 610 610 3367 Ext: 1 Use:  E-Mail Address:

Taxable Customer Advertisement:

Leasing Company Rework:  Over The Counter  Third Party  Disallow Tagalongs

License: TH4SJ5 State: PA Color:

Insp Date: VIN Number: 44683218946

Reasons / Inspection Forms  Salesperson  Manager  Estimator

Service Comments

History Info Blank Vehicle Profile Customer Profile << Back Next >>

4. Click on the **TYPE** button and you will see a list of customer types appear, as shown below. (These are the customer types that you selected in Maintenance in the previous section.)

Type	Description	Tax	Labor
01	REGULAR CUST	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10	NATIONAL	<input type="checkbox"/>	<input type="checkbox"/>

**WARNING: Changing Customer Type will not automatically change part prices.**

Customer Type

5. **HIGHLIGHT** the **CUSTOMER TYPE** you want to use and click **SELECT**. This customer is now assigned to the customer type you selected and will remain under that customer type for future invoices.